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Invite Guests To A Call As A Provider

- 2023-08-09 - VSee Clinic for Providers

When enabled on the clinic settings, providers and patients can invite guests to a call by using the Guest Invite Feature. This can allow providers and patients to securely bring a family member or an interpreter into a video visit using a meeting link or dialin number. This invitation can be sent through e-mail and text message as well.

How do I invite a guest to a call prior to a scheduled appointment? How do I invite a guest while a call is in progress?

While Scheduling an Appointment

You can invite a guest to a scheduled call by following the steps below:

VSee Clinic Dashboard Patients Schedule Health e-Rx 🗩 \, 🌔 Joel B 🔻 Invite Patient ✓ New Visits (1) ÷ Today's Schedule Visit ID 21827874 Joel B's Test Clinic Call No appointments at this tim No Host E-Consult 8 8 No E-Consults at this time Tags: Add tag Reminder In Progress (0) 0

1. From your clinic dashboard, click on the **Schedule** tab.

2. Drag from the calendar to select the time slot for the appointment and click on **Create New Visit**.

VSee Clinic Dashboard Patients	Schedule	2	Create New	× Create Slots			Dittel 1 +
SCHEDULE			Visit Schedule an appointment & Invite your patients to join	Set your available slots so patients can book a visit at their convenience			Month Week Day + CREATE
AUTO-02 001 Pacific Tim				10			
Time division							
30 v Minutes							
M Show consultations							
Legend ^							
V Open slot							
Confirmed (one-one)							
Conference (group)							
Completed							
Canceled							
Pending							
						E001M-8307H-	
Feedback							

- 3. Fill-in the necessary details for the visit.
- 4. Click on + Other guest.

Visit Nam	e *				
VSee Aca	demy Clinic	Appointment			
Time *					
Now	Later	Fri 04/08/2022	08:00 PM		
Does not r	repeat	*			
Visit Type					
Video	Phone	In Person			
Visit Opti 15-min Co	on *			~	
Add Patie	nt*				
Search by	name, ema	il, phone # and more.			
Patient w <mark>ill</mark> b	e notified auto		d message		
	DTIONS				
MORE O	vider + C	Other guest + Remir			

5. You can choose to enter the e-mail address or the phone numbers of the guests you wish to invite.

6. Once the details are complete, click **Create Visit.**

Add otr	er guest
Invite otl	ers to the visit by entering their email addresses or phone numbers below, separated by ; guest@email.com
	· (201) 555-0123

- 7. Confirm the details of the visit.
- 8. Click on **Confirm** to proceed.

Confirm No	ew Visit	×
Visit Name	VSee Academy Clinic Appointment	
Time	Now (Fri, Apr 08, 2022 06:47 PM (PDT))	
Visit Type	Video	
Room	VSee Academy Clinic	
Visit Option	15-min Consultation	
Patient		
Provider		
Other guest		
	Back Confirm	

The scheduled visit with the patient and a guest is now confirmed.

During a call

There are two ways to invite a guest while a call is already on-going:

A. From the active call window:

1. Click on the **+Person / Add Participants** button.

VSee Clinic Dashboard Patients Schedule		🕕 Joel B 🔻
	Add tag Status In Progress (All participants	Add Participants
	Adm Doze Scroll Ager 42, Apr 07, 1980	# Visit ID: 21870574 Today 07-942 PM Video Visit 15-min Consultation 0 15-min Visee Academy Clinic
JD	Intake Valts Documents Intake C 00/08/2022 O 07/12 PM	
	— The patient gave consent to participate in this Televendricine Comultation. Yes	
	add Dee	
x × × © ¬ : … <mark>^</mark>		

2. You will then be able to see the link (For Windows and macOS computers or Android phones, iPhones and iPads) and the Dial In number (Landline or mobile phone via cellular network).

3. You can also send the invitation link and Dial-In Number for the guest through email or SMS by typing in their e-mail or phone number, respectively.

4. Once you have typed in the e-mail addresses and phone numbers, click on **Send Invitation**.

Invite Guests	
Copy the message below and send to your guests:	2
You are invited to join a scheduled meeting at Thu, 04/07/2022 03:20 PM. Join call: https://vsee-academy-in-browser.vsee.me/visits/join/624f6397f7104675b691014e64457b11 Dial in: +1.650.758.0255 (PIN 323068) 	
	Copy Invitation
OR	
Send invitation via email or SMS:	Ĭ
guest@email.com	
Enter phone numbers here separated by;	
	Send Invitation
	4

B. From the Clinic Dashboard:

1. On the waiting room dashboard, click on the **patient's name**.

VSee Clinic Dashbo	ard Patients	Schedule	Health	e-Rx	Doel B 🕈 💭
					Invite Patient Schedule
✓ New Visits (1)					Today's Schedule
Visit ID 21852199 voel B's Test Clini				Call	No appointments at this time.
Available Male , 22 years		æ		No Host	E-Consult
Tags: Add tag					No E-Consults at this time.
V In Progress (0)					Reminder
There are no ongoing visits.					 John Doe Visit #21851811 Pending notes
					Lohn Doe Visit #21827874 Pending notes
					 Visit #21573145 Pending notes

2. Click on **Add Participants**.

VSee Clinic Dashboard Patients Schedule Health e-Rx	🗩 🌔 Joel B 🗸
Add tag Status: New	2 Call Add Participants End Visit
All participants John Doe Available Age 22, Jan 01, 2000, Male P Image: Compart of the second secon	 # Visit ID: 21852190 ➡ Today 04:41 PM ■ Video Visit ● Test Visit ● Test Visit ● S mins ♥ Joel B's Test Clinic
Intake Notes Payment Visits Health Medical History Allergies Medications Intake	Documents
O4/07/2022 O 04:41 PM There are you located at the time of this visit? Virginia	
The patient gave consent to participate in this Telemedicine Consultation. Yes	

3. You will then be able to see the link (For Windows and macOS computers or Android phones, iPhones and iPads) and the Dial In number (Landline or mobile phone via cellular network).

4. You can also send the invitation link and Dial-In Number for the guest through email or SMS by typing in their e-mail or phone number, respectively.

Invite Cu						
Copy the me	esiss Issage below and send to your guests:					
You are i • Join ca • Dial in	3 You are invited to join a scheduled meeting at Thu, 04/07/2022 03:20 PM. • Join call: https://vsee-academy-in-browser.vsee.me/visits/join/624f6397f7104675b691014e64457b11 • Dial in: +1.650.758.0255 (PIN 323068)					
			Copy Invitation			
	OR					
Send invitat	ion via email or SMS:		4			
	guest@email.com					
	Enter phone numbers here separated by ;					
			Send Invitation			

5. Once the guest clicks the link, they will be taken to the VSee Clinic appointment details screen. They will be prompted to input their name.

Note: If the guest joined through phone using the Dial-in number, they will be prompted to input the Pin, and once confirmed, they will be able to join the call through voice call.

6. Once the guest typed in their name, they should click on **Join Meeting**. They will then be added unto the call as a guest participant.

V	'See Clinic
Date: Time: Host:	Fri, 04/08/2022 06:33 PM Joel B
Enter your	name*
	Join Meeting

7. From your dashboard, you will be able to confirm the presence of the guest from the Visit Details.

VSee Clinic	Dashboard Patients	Schedule Health	e-Rx		🗩 🌔 Joel B 🗸
Call Selected			What's new on this dashboard?	Invite Patient	Schedule
 New Visits (0) There are no participants waiting 			¢	Today's Schedule No appointments at this time.	
 In Progress (1) Visit ID 21870492, VS 	See Academy Clinic		Call	E-Consult No E-Consults at this time.	
Jane Gal Available 21 years		e 🙆	Joel B	Reminder	
Guest Available		Ø	Last action by Joel B	John Doe Visit #21852190 Pending notes	
Tags: Add tag				John Doe Visit #01951911	
				O Pending notes	
				 Jane Doe ♥ Visit #21850991 ♥ Pending payment 	

Scope and Limitations

• Since the participants will be added as guests, there will be no information about the participants that will be accessible from the clinic.

The Guest Invite Link will expire when:

- The time has lapsed for the scheduled visit.
- The provider completes the visit.

Related Articles

- Invite Guests for Patients
- Invite Guests for Ad Hoc Group Call

If you have any questions, please contact us at help@vsee.com

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Tags invite guest

invite guests

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